Action Item List Formats Instructions

Example formats for keeping track of action items that need to be accomplished during a project. Although the concept and typical formats are simple, different teams do end up crafting Action Item List variations that suit how they want to use such lists for project tracking and communication. So we included several formats we've seen.

- Formats 1 and 2 are at a detailed level, to be used by project teams tracking detailed action items that arise each week.

- Format 3 shows an example of how organizational-type items might initially be documented in a major meeting and included in meeting minutes for communicating that actions have indeed been taken to address the concerns of the group.

What gets measured (or tracked) gets done and "the devil is in the details". There are many project details that don't warrant a task line in the schedule. On the other hand, they have to get done and often by a certain time in order to not hold up related project activities or decisions. Action item lists are a commonly used mechanism to record and track such details to keep them from falling through the cracks. Beyond project-specific action item lists, organizations can keep track of important actions assigned to address important work and issues like process improvement, strategy and the like.

Start a detailed Action Item List as shown in Formats 1 and 2 early in a project, typically at the beginning of the Initiation Phase when multiple people are forming the new project team and getting busy on the work of the project. In fact, the Action Item List is key in the Initiation Phase because, when that phase starts a schedule for tracking, tasks won't exist yet.

1. Determine the format and program you want to use. The list can be implemented in a spreadsheet, a word-processing document or a database. See the examples in this file for different formats and create your own variation if desired.

2. Assign responsibility for maintaining the list. This usually falls to the project manager or a designated "project coordinator".

3. Record new actions in each team meeting.

4. Determine how you'll track action item status. Options include:

   - Get status in the regular team meeting. Have people report status on those due by today's date or due within the next week. CAUTION: Although this approach is useful for holding people accountable to their due dates (no one really likes to have to say they’re late in front of a bunch of people), it can also slow team meetings down. If you use it, insist on very brief status reporting: yes-done, no-open; a statement on plan for completing it; and for upcoming items simply whether it’s on track or in trouble and who the owner needs to work with to get it out of trouble.

- Collect status offline before the team meeting. For example, set a norm that team members will report status on any actions they own, that are due in the next two weeks, a day before the team meeting. The project manager or coordinator then updates the Action Item List with that information and brings it to the team meeting for reference. The project manager also examines the status before the meeting and flags any items that should get highlighted to the team, or requiring discussion by the team in the meeting, so that the meeting stays efficient by only discussing those that truly need group attention/discussion.

5. Post the latest Action Item List where all team members can access it, to see status of items not covered in the meeting and always be able to see what items they have been assigned.

6. Strive to keep your completion metric (the percent of actions completed on time during each time period) at 80% or above. As a rule of thumb, when completion rates start to fall, dates are being assigned too aggressively, people aren’t taking the due dates seriously, or some combination of the two. Make sure the tool is used correctly!

Action Item List Formats

Format #1: Simple Action Item List – Table format

This format is one of the simplest. It can be implemented in a word processing program or spreadsheet. Examples of each implementation are shown on the next page. The list below explains the fields used.

Fields:

#:	Number assigned to the action.
Description or Item:	Concrete, very specific description of the task to be completed.
Owner or “Who”:	Person responsible for making sure the action is completed by its due date. May or may not be the person who actually executes the task. The Owner is the person held responsible, who will task other people if appropriate and report status on the action.
Date Assigned:	This is an optional column, but a handy one to include. Allows the team to have a record of when the action was assigned, gives visibility into how long an action has been open without resolution.
Due Date:	Date by which the action item should be completed. Note: A common question is what to do in this column if an action item is NOT completed by the due date – change the due date or leave it? Our recommendation is not to just change the date because then you lose visibility into the fact that your original plan didn’t hold. A better approach is to leave the original date, then add a new entry in the “Due Date” column of the form “Rescheduled–[new date].” The Status column can then be used to record a few words as to why the action due date was rescheduled.
Status/Notes:	Place to put notes, if needed, to reflect any interim progress, issues, status, rescheduling reasons for the action. This column can be a good communication tool for action items in progress.
Date Closed:	Date on which the action item was completed. Filling in this column allows you to glance at the table and see which actions have been closed, and recording the date closed rather than just a DONE status with no date, provides a record of how the team’s action item closure is doing – how many have been closed on time vs. late.

This column can also be color coded to help with giving a trend visual. Some teams color the “Date Closed” column green when an action is closed on time, yellow when the action was closed late but within a week of its original date, and red if it was closed later than a week past its due date. If a team’s Action Item List starts looking mostly red, it can signal issues with how aggressively action due dates are being assigned, or issues with workload, or issues with action due dates being taken seriously.

Format #2: Action Item List with Categories

All the columns in this table are the same as those described for Format #1 on the previous page, except for Category.

Category: Some teams include this category to make longer action item lists easier to scan. Categories can be areas from your work breakdown, or functional groups, or other labels that map to types of work or issues.

Note also that in the description field, this team included a bolded label before the rest of the description text. This is simply another trick for making a long action item list easy to scan for items of interest to particular team members or managers.

Format #3: Action Items published in Meeting Results

This format is slightly different because it is meant to serve a different purpose. Whereas the above formats are geared to teams recording actions week after week and maintaining a running list, the format below is geared to communicating the major actions recorded in an important meeting.

In the project review meeting that this example was drawn from, a team of Directors of various related sub-project teams and functional groups identified three major areas needing attention after the meeting. This group was in the planning phase for a major new complex project that was meshing the work of several sub-teams. It needed to ensure that each sub-team had enough administrative and other support for the major program and developing norms for these sub-teams to work together effectively. Therefore, the action item list included in the meeting minutes, includes several gray divider rows highlighting those three areas of concern, with the related actions listed beneath them.

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